

# Pet Care in Australia

June 2024

**Table of Contents** 

## Pet Care in Australia

## **EXECUTIVE SUMMARY**

Pet care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for pet care?

#### MARKET INDICATORS

Table 1 - Pet Populations 2019-2024

#### MARKET DATA

- Table 2 Sales of Pet Food by Category: Volume 2019-2024
- Table 3 Sales of Pet Care by Category: Value 2019-2024
- Table 4 Sales of Pet Food by Category: % Volume Growth 2019-2024
- Table 5 Sales of Pet Care by Category: % Value Growth 2019-2024
- Table 6 NBO Company Shares of Pet Food: % Value 2019-2023
- Table 7 LBN Brand Shares of Pet Food: % Value 2020-2023
- Table 8 NBO Company Shares of Dog and Cat Food: % Value 2019-2023
- Table 9 LBN Brand Shares of Dog and Cat Food: % Value 2020-2023
- Table 10 Penetration of Private Label in Pet Care by Category: % Value 2019-2024
- Table 11 Distribution of Pet Care by Format: % Value 2019-2024
- Table 12 Distribution of Pet Care by Format and Category: % Value 2024
- Table 13 Distribution of Dog and Cat Food by Format: % Value 2019-2024
- Table 14 Distribution of Dog and Cat Food by Format and Category: % Value 2024
- Table 15 Forecast Sales of Pet Food by Category: Volume 2024-2029
- Table 16 Forecast Sales of Pet Care by Category: Value 2024-2029
- Table 17 Forecast Sales of Pet Food by Category: % Volume Growth 2024-2029
- Table 18 Forecast Sales of Pet Care by Category: % Value Growth 2024-2029

## DISCLAIMER

## **SOURCES**

Summary 1 - Research Sources

## Cat Food in Australia

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Exploring growth drivers of cat food

Price sensitivity and pet care in Australia

Mergers, acquisitions, and market dynamics

## PROSPECTS AND OPPORTUNITIES

Trends shaping the future of cat food demand in Australia

Scaling up for success: Strengthening manufacturing capabilities in cat food

Catering for cat owners' preferences

## **CATEGORY INDICATORS**

Table 19 - Cat Owning Households: % Analysis 2019-2024

Table 20 - Cat Population 2019-2024

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2019-2024

#### CATEGORY DATA

- Summary 2 Cat Food by Price Band 2024
- Table 22 Sales of Cat Food by Category: Volume 2019-2024
- Table 23 Sales of Cat Food by Category: Value 2019-2024
- Table 24 Sales of Cat Food by Category: % Volume Growth 2019-2024
- Table 25 Sales of Cat Food by Category: % Value Growth 2019-2024
- Table 26 Sales of Dry Cat Food by Life-Cycle: % Value 2019-2024
- Table 27 Sales of Wet Cat Food by Life-Cycle: % Value 2019-2024
- Table 28 NBO Company Shares of Cat Food: % Value 2019-2023
- Table 29 LBN Brand Shares of Cat Food: % Value 2020-2023
- Table 30 LBN Brand Shares of Cat Treats and Mixers: % Value 2020-2023
- Table 31 Distribution of Cat Food by Format: % Value 2019-2024
- Table 32 Forecast Sales of Cat Food by Category: Volume 2024-2029
- Table 33 Forecast Sales of Cat Food by Category: Value 2024-2029
- Table 34 Forecast Sales of Cat Food by Category: % Volume Growth 2024-2029
- Table 35 Forecast Sales of Cat Food by Category: % Value Growth 2024-2029

## Dog Food in Australia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Category's resilience in Australia, driven by premium dry dog food Convenience and quality: Driving forces behind demand for dry dog food Sustainable innovation through protein alternatives and packaging

## PROSPECTS AND OPPORTUNITIES

The humanisation of pets: Transforming dog food in Australia
The evolution of health-driven innovation in dog food
Exploring diversification in dog food's retail landscape

#### **CATEGORY INDICATORS**

- Table 36 Dog Owning Households: % Analysis 2019-2024
- Table 37 Dog Population 2019-2024
- Table 38 Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2019-2024

## **CATEGORY DATA**

Summary 3 - Dog Food by Price Band 2024

- Table 39 Sales of Dog Food by Category: Volume 2019-2024
- Table 40 Sales of Dog Food by Category: Value 2019-2024
- Table 41 Sales of Dog Food by Category: % Volume Growth 2019-2024
- Table 42 Sales of Dog Food by Category: % Value Growth 2019-2024
- Table 43 Sales of Dry Dog Food by Life-Cycle: % Value 2019-2024
- Table 44 Sales of Wet Dog Food by Life-Cycle: % Value 2019-2024
- Table 45 NBO Company Shares of Dog Food: % Value 2019-2023
- Table 46 LBN Brand Shares of Dog Food: % Value 2020-2023
- Table 47 LBN Brand Shares of Dog Treats and Mixers: % Value 2020-2023
- Table 48 Distribution of Dog Food by Format: % Value 2019-2024
- Table 49 Forecast Sales of Dog Food by Category: Volume 2024-2029
- Table 50 Forecast Sales of Dog Food by Category: Value 2024-2029
- Table 51 Forecast Sales of Dog Food by Category: % Volume Growth 2024-2029
- Table 52 Forecast Sales of Dog Food by Category: % Value Growth 2024-2029

#### Other Pet Food in Australia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Exploring the growth of other pet food in Australia

Rising popularity of private label and non-prepared meals among other pet owners

Distribution trends in other pet food

## PROSPECTS AND OPPORTUNITIES

The impact of urbanisation on other pet ownership in Australia

Nutrition and humanisation trends in other pet food

Balancing demand and innovation

#### **CATEGORY INDICATORS**

Table 53 - Other Pet Population 2019-2024

#### **CATEGORY DATA**

Table 54 - Sales of Other Pet Food by Category: Volume 2019-2024

Table 55 - Sales of Other Pet Food by Category: Value 2019-2024

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2019-2024

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2019-2024

Table 58 - LBN Brand Shares of Bird Food: % Value 2020-2023

Table 59 - LBN Brand Shares of Fish Food: % Value 2020-2023

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2020-2023

Table 61 - Distribution of Other Pet Food by Format: % Value 2019-2024

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2024-2029

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2024-2029

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2024-2029

## Pet Products in Australia

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Exploring trends in Australia's pet products

Understanding seasonal trends in purchases of pet products

Trends in dynamic space of pet dietary supplements

## PROSPECTS AND OPPORTUNITIES

The rise of proactive pet care products

Transparency trends in pet dietary supplements

Generation Z goes digital: Driving demand for advanced pet technology

# CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2019-2024

Table 67 - Sales of Pet Products by Category: % Value Growth 2019-2024

Table 68 - Sales of Pet Healthcare by Type: % Value 2019-2024

Table 69 - Sales of Other Pet Products by Type: % Value 2019-2024

Table 70 - NBO Company Shares of Pet Products: % Value 2019-2023

Table 71 - LBN Brand Shares of Pet Products: % Value 2020-2023

Table 72 - Distribution of Pet Products by Format: % Value 2019-2024

Table 73 - Forecast Sales of Pet Products by Category: Value 2024-2029

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-australia/report.